Provider Management
How Do I Guide

Home Inquiry

How Do I...?	Selections	Tips & Guidelines
Establish home inquiry record	- Click Create > Provider > Home Inquiry. - On the Intake Inquiry Search page, complete the first name and last name fields. - Click the Search button. - For a match: Select the radio button for the applicable person(s) and click Continue. - For no match: If displayed, click the Close button on the Validation Errors web page dialog box on the Intake Inquiry Search page. Click the Create button to access the Intake Participant page. Enter all applicable data/values and click the Continue button. If potential person matches exist, the Potential Person Match page will display a list of participants that are an exact person match. To proceed with creating a new person, click the Close button on the page. To select an existing record, click the appropriate radio-button and then click the Continue button. The participant will be added to the Participants group box on the Intake Inquiry Search page. - Add additional participants by completing the first name and last name fields and repeating the step above. - After all participants have been added and searched, click Continue. - On the Home Inquiry page, enter the applicable data/values.	*One family member must have a role of Parent 1. This is generally the female head of household.* *If you close an inquiry before completion, reopen it from the Intakes tab. If you don't see a pending inquiry, click the Refresh button on the Banner.* *Participants can include children in the home, but should not include children who are in placement in the home.* *Note: Workers must have additional security access to create and maintain Treatment Foster Home Providers.*
Complete inquiry	- On the Basic tab: - If appropriate, select the Search link to add the Parent Agency. On the Search page, complete the Provider Name field and click the Search button. Click the radio button for the appropriate provider and click Continue.	*When adding a Parent Agency to a record, the provider who is the Parent Agency must already be entered in the system.* *To direct payments to a parent agency, you must enter the applicable information on the Basic tab via the Search link next to Parent Agency.* *A Home Inquiry Checklist is available from the Options list.*
Screen in/out home inquiry	- On the Basic tab, Worker/Committee group box, click the applicable radio button (Accept/Screen In or Not Accept/Screen Out). - Select the applicable Reason field value. Click Save and Close.	*In the event a Home Inquiry is screened out the user can view the screened out information from Utilities> Person Search.*

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WiSACWIS Knowledge Web
http://dhfs.wisconsin.gov/wisacwis/knowledge_web/index.htm

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Home Provider

How Do I…?	Selections	Tips & Guidelines
View/update home provider information	▪ On the Providers outliner, click on the applicable provider link. ▪ On the Home Provider page, view/enter applicable data/values.	*Remember to document bed capacity information on the Services tab.*
Change parent agency	▪ On the Provider outliner, click on the applicable provider link. ▪ On the Home Provider page/Home tab, select Parent Agency History from the Options list. ▪ On the Parent Agency History page, click the Insert button. ▪ On the Provider Search page, complete provider name field and click the Search button, click the applicable provider radio button, and click Continue.	*It is important to keep the parent agency information current and accurate for purposes of directing payments on this placement or new placements with the home.* *When searching for providers associated with a parent agency, the "Search Providers of Parent Agency" checkbox will return the parent agency and all providers under that parent agency.*
View/update provider repayment method	▪ On the Home Provider page/Home tab, select Provider Repayment Method from the Options list. ▪ On the Provider Repayment Method page, view/enter applicable data/values. Click Save.	
Add home provider participant	▪ On the Members tab, click the Insert button. ▪ On the Search Person page, enter the applicable data/values and click the Search button. 　▪ For a match: Select the radio button for the applicable person(s) and click Continue. 　▪ For no match: If displayed, click the Close button on the Validation Errors web page dialog box on the Search page. Click the Create button to access the Person Management page. Enter all applicable data/values. ▪ Click Save and click Close.	*This allows a new member of the household to be added.*
Add home provider training record	▪ From the Training tab, click the Insert button. ▪ Enter applicable data/values.	
Change status of home provider participant	▪ On the Members tab, select the applicable status link for the appropriate member. ▪ On the Member Status page, enter the applicable data/values.	*Options: DeActivate and ReActivate to change status; Remove to remove a person mistakenly associated with the provider.* *After de-/activating a home provider participant the Marital status field should be updated accordingly. When only one parent has an active status the system will allow user to select the values associated with single-parent household. When both parents are active the user can select the values describing a two-parent household.*
Add non-licensed service offered by home provider	▪ On the Home Provider page/Services tab, select the Edit Unlicensed Services link. ▪ Click the Insert button on the Edit Unlicensed Services page. ▪ Enter the applicable data/values for the Service Category and Service Type. ▪ Complete the other applicable data/values. ▪ Click Save.	*This allows you to add services such as a clothing allowance or other non-licensed services.*

Home Provider

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	Change the designated county	■ Follow the directions for changing a physical address in the Provider Address section of this guide.	*When you change the designated county, eWiSACWIS closes the current license and creates a new pending license.*
	Setup a provider for Electronic Funds Transfer	■ On the Home Provider page/Home tab, select the EFT expando. ■ Select the checkbox for Request Prenote.. ■ In the Bank Information group box, enter the applicable data/values. ■ Click Save and click Close.	*Only workers with specific security can access the EFT expando area on the Home Provider page..* *A batch process is required to run before the provider can be switched to EFT.*

Home Provider License

	How Do I…?	**Selections**	**Tips & Guidelines**
Home Provider License	License home provider	■ Click Create > Provider Work > License>Create License. ■ Click the appropriate provider. ■ Click the Create button. ■ On the License page, enter the applicable data/values.	*Make sure the bed capacity, service details, and total capacity information is complete and accurate before submitting the license for approval.*
	Add licensed services offered by home provider	■ On the Providers outliner, click appropriate provider icon. ■ Click Licenses > appropriate license. ■ On the License page, select the Services tab, click the Edit Licensed Services link. ■ Enter applicable data/values on the Licensed Services page. ■ Click Save and Close.	*When adding services for any county, select the appropriate county from the County list and click the Edit Licensed Services link.* *Only a designated county worker can make changes to the Home Provider record and license, unless the Provider is a Treatment Foster Home.* *Workers must have additional security access to create and maintain Treatment Foster Home Providers and licenses. Workers who have access to Treatment Foster Homes do not have to be from the designated county of the Provider record to make changes.*
	Update/complete pending license	■ On the Providers outliner, click appropriate provider icon. ■ Click Licenses > pending license. ■ On the Home Provider License page, enter applicable data/values. ■ On the Basic tab, select Approval from Options list. Click Go. ■ Select Approve on Approval History page. Click Continue. ■ Click Save and click Close. *Note: Select the appropriate decision in the Assessment Decision group box before approving the license.*	*The license template must be completed and viewed before submitting to your supervisor for approval since no additions or changes can be made after approval. The templates may be accessed via the Basic tab by selecting the appropriate template from the options list.* *Service Rate from the Options list on the Services tab must be accessed to add a provider specific rate to a selected service.*
	Print license	▪ On the Basic tab of the Home Provider License page, select the appropriate license (Treatment Foster Home License or Foster Home License) from the Options list and click Go. ▪ Click File > Print. Click Close Document and Return to eWiSACWIS.	*The license template must be viewed prior to approval in order to print the license.*

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	Re-license foster home provider	■ Click Create > Provider Work > License > Re-license > appropriate provider. ■ Click the Create button. ■ On the Relicensing Select page, click the applicable license. Click Continue. ■ On the License page, enter the applicable data/values. ■ On the Basic tab, select Approval in the Options list. Click Go. ■ Select Approve on Approval History page. Click Continue. ■ Click Save and click Close.	*A License About to Expire tickler will be received prior to the license expiration date. The tickler will be deleted and reset once the supervisor approves the re-licensing action.* *Note: The active license cannot be relicensed more than 90 days before the license end date.*
	Close/revoke/put a license on hold/made in error	■ On the License page/Basic tab, select Additional Licensing Actions from the Options list and click Go. ■ Click the Insert button on the Additional Licensing Actions page, click appropriate value; select Approval from the Options list. Click Go. ■ Select Approve on Approval History page. Click Continue. ■ Click Save and click Close.	*A license put on hold can be re-activated through the Additional Licensing Actions page.* *A Provider whose license is 'Revoked' cannot be licensed until the legally mandated 2-year waiting period has elapsed.*
	Re-apply after license has been revoked	■ On the License page/Basic tab, select Additional Licensing Actions from the Options list and click Go. ■ Click the Insert button on the Additional Licensing Actions page, click Re-Apply; document Reason 1, select Approval from the Options list. Click Go. ■ Select Approve on Approval History page. Click Continue. ■ Click Save and click Close.	*When Reason 1 contains value Met re-application req. of 56.04(3), the system will allow creating a new on-line license with the begin date being the date following the Revocation date.* *Not met re-application req. of 56.04(3) value will enforce the legally mandated 2-year waiting period associated with license revocation.*

Private Provider

Private Provider	**How Do I…?**	**Selections**	**Tips & Guidelines**

	Establish private provider record	■ Click Create > Provider > Private Provider. Click the Options button and Click Provider Search.
		■ On the Provider page/Provider tab, click the Provider Search link.
		  ▪ For a match: Select the applicable provider and click Save.
		  ▪ For no match: Click the Close button and enter the additional data/values on the Private Provider page. Click Save.
		■ On the Private Provider page/Provider tab, select Approval in the Options list. Click Go.
			For private providers, the FEIN must be entered to ensure payment.
			
			If a paid service is activated, you must set the rate by selecting Provider Service Rate from the Options list > on the Services tab.
			
			When searching for providers associated with a parent agency, the "Search Providers of Parent Agency" checkbox will return the parent agency and all providers under that parent agency.

	View/update private provider information	■ On the Providers outliner, click appropriate provider link. ■ On the Private Provider page, enter the applicable data/values.	*Workers must have additional security access to create private provider types of RCC, Group Home, Emergency Shelter, CPA and Duplicate.*
	Add/update services offered by private provider	■ On the Private Provider page/Services tab, click the Insert button. ■ Enter the applicable data/values for the Service Category and Service Type. ■ Complete the other applicable data/values. ■ Click Save.	

	View/update provider repayment method	▪ On the Private Provider page/Provider tab, select Provider Repayment Method from the Options list. Click Go. ▪ On the Provider Repayment Method page, view/enter applicable data/values. Click Save.	
	Setup a provider for Electronic Funds Transfer	▪ On the Private Provider page/Provider tab, select the EFT expando. ▪ Select the checkbox for Request Prenote.. ▪ In the Bank Information group box, enter the applicable data/values. ▪ Click Save and click Close.	*Only workers with specific security can access the EFT expando area on the Private Provider page..* *A batch process is required to run before the provider can be switched to EFT.*

Address Changes

	How Do I…?	Selections	Tips & Guidelines
Provider Address	Change physical address	▪ Click Create > Provider Work > Maintenance > Create Physical Address > appropriate provider. ▪ Click the Create button. ▪ On the Create Physical Address page, enter the applicable data/values.	*When a provider moves and the new physical address is entered, eWiSACWIS closes the current license.* *If the license being closed is a Foster Home license, a new pending license is automatically created. If the license being closed is a TFC license, the worker must create the new license.*
	Correct physical address	▪ Click Create > Provider Work > Maintenance > Maintain Physical Address > appropriate provider. ▪ Click the Create button. ▪ On the Maintain Physical Address page, enter the applicable data/values.	*Maintain Physical Address is only used to correct typos.*
	Create/change mailing address	▪ Click Create > Provider Work > Maintenance > Mailing Address > appropriate provider. ▪ Click the Create button. ▪ On the Create Mailing Address page, enter/change the applicable data/values.	*The mailing address is where the check will be sent. If there is no mailing address in eWiSACWIS, checks will be sent to the physical address.*

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Recruitment

How Do I…?	Selections	Tips & Guidelines
Document recruitment event	■ Click Create > Recruitment Event. ■ On the Recruitment Event page, enter the applicable data/values.	*This page allows you to document participants who attended the recruitment event.*
View/update recruitment event information	■ Click Maintain > Recruitment Event. ■ On the Recruitment Activity page, click the Edit link for applicable event, view/update the applicable data/values.	
Record recruitment event participant information	■ On the Recruitment Event page, click the Recruitment Participants expando and click the Insert button. ■ Enter the applicable data/values.	*Text selections in the Options list: Print Labels, Print Participants List, and Export Participant List*
Revise participant information	■ Click Maintain > Recruitment Event. ■ On the Recruitment Activity page, click the Edit link for applicable event. ■ Click the Recruitment Participants expando, enter the applicable data/values.	

Inactivate Duplicate Providers

How Do I…?	Selections	Tips & Guidelines
Inactivate a Duplicate Provider	■ Select the Provider Record that has been identified as a duplicate. ■ Click the Provider name hyperlink to launch Provider Maintenance ■ In the header section, from the Type dropdown select "Duplicate". ■ Click the Search hyperlink adjacent to the Type dropdown to search and select the appropriate Provider record that you want this duplicate provider to be linked to. ■ Click the Notify checkbox to generate email notifications to workers that have open placements with this duplicate provider. ■ After the 14 day time period, ensure that the placements that were affected have been re recorded in the system with the appropriate provider records. ■ Click the Complete checkbox and Save the record.	*Only workers with appropriate security access can perform the provider link process.* *The worker will also have to be assigned to the Provider in order to link it to a suitable record.* *The process is irreversible. However, the search hyperlink will stay enabled allowing Provider A that was linked to Provider B mistakenly to be correctly linked to Provider C.* *Home providers can be linked to Private providers and vice versa.*

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Assignment

How Do I…?	Selections	Tips & Guidelines
Assign existing provider	- Click Utilities > Search. - On the Search page, select the Provider Organization tab. - Enter applicable Search Criteria data/values. Click the Search button. - Click the appropriate Provider record icon. - Click the Assignments icon. - Click the Actions link for an existing assignment. - Click the Create Assignment radio button. - On the Create Worker Assignment page, enter the applicable data/values. - Click the radio button for the worker receiving this assignment. - Click the Assign button and click Close.	*You can assign yourself to an existing provider if you have appropriate security access.* *If a provider is not known to eWiSACWIS, please see Home Inquiry section to create the provider.* *When searching for providers associated with a parent agency, the "Search Providers of Parent Agency" checkbox will return the parent agency and all providers under that parent agency.*

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